

INTERIM REVIEW MEETING TIPS

Interim review meetings are planned times (April and August) when coaching and feedback between employee and supervisor take place. Employees need to hear from their supervisor in regards to how they are doing on the job in all four performance categories. An interim review meeting provides the supervisor an opportunity to encourage and direct the employee.

Even though the evaluation form does not allow for comments to be made regarding employee's work performance for the months of September-December, pertinent comments may be attached to the evaluation form regarding the employee's work performance for this period of time. If comments are attached they should be signed and dated in red ink by both employee and evaluator.

NOTE: Coaching and feedback can occur at any time during the performance year.

Interim review meetings are:

- An opportunity for the supervisor and employee to make sure performance is on track with the required job duties and expectations.
- A chance to identify performance problems so they can be corrected as soon as possible.
- A time for the supervisor to praise the employee verbally or commend them in writing.
- A good time for the employee to point out accomplishments or problems that have been resolved, which otherwise might not have come to the supervisor's attention.

NOTE: A supervisor who knows about specific accomplishments and problems during the year will be better prepared to judge progress and evaluate performance at the end of the year. An employee who has participated in several coaching sessions should have no surprises at the year end evaluation.

Coaching allows for problems to be caught early and also provides the opportunity for the supervisor to collect information that will be helpful when completing the year end evaluation. Following are some ways of collecting information:

Direct Observation	Observing the employee while he/she performs day-to-day work activities.
Written Material	Any form of written material the employee creates, generates, or reviews, such as letters, reports or forms that are used as part of the job.
Notes From Customers	Any notes a supervisor has kept that customers have written about the employee.

Notes From The Employee

The employee should keep their supervisor informed of their progress and any problems they may be having on the job. These notes may help a supervisor remember a specific situation where job performance was excellent or unacceptable.

Supervisor's Own Notes

If the supervisor notices an accomplishment or a problem, but doesn't have time for a brief coaching session, the supervisor may write a note and put it in a file to refer to later. See *Sample Performance Incident Log on page 68*.

Team Feedback

It is appropriate to include both team leader and peer feedback as one source of information to help a supervisor determine evaluation ratings. Of course, it is important that the employee be informed at the planning meeting that the supervisor will consider feedback from other team members.

NOTE:

Sometimes a supervisor may underestimate the importance of regularly talking to employees about their work. Employees need to know what they are doing right and of any areas in which they need to improve. They also need to know **what** they must do to improve their job performance.

Following are some things a supervisor might do during an Interim Review Meeting:

- Review the duties and expectations included in the employee's performance plan and make any needed revisions.
- Share information that has been gathered regarding the employee's performance. The gap between actual and expected performance should be discussed.
- Ask the employee what the supervisor can arrange in terms of training, equipment or assistance to help them improve their performance.
- A schedule for following up on employee's progress in the future may be decided.
- If the employee seems to be heading towards a rating of **Unacceptable**, the supervisor should develop an **Improvement Plan** to clearly identify the problems and actions necessary to improve within a certain time frame. See *Sample Performance Improvement Plan on page 67*.
- Show support and express confidence in the employee's ability to improve performance.
- Acknowledge improvements and accomplishments. Praise gradual improvements.